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Ontario's U.S. Travel Markets, 2003

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Highlights

- In 2003, visitation from the U.S. to Ontario decreased by 16% over 2002. This was by far the largest drop in visitation over the last six years.
- U.S. visitors spent $3.6 billion in the province and an additional $347 million on Canadian carrier fares in order to get here, for a total of $4.0 billion in 2003. Ontario received 43% of all spending by U.S. visitors in Canada in 2003 ($4.0 billion out of $9.2 billion).
- Visitor spending decreased by 19% from $4.9 billion in 2002 to $4.0 billion in 2003.
- After removing inflationary impacts, U.S. visitor spending in Ontario in constant dollars (1992) decreased by 16% from $3.8 billion in 2002 to $3.1 billion in 2003.
- 30% of total U.S. visitors in 2003 travelled to Ontario in the summer.
- Nearly all U.S. visitors (89%) travelled in parties of adults only. Average party sizes ranged from 2.0 to 2.4 depending on the origin of the visitor.
- Half (50%) of U.S. visitors spent nights in roofed commercial accommodation while travelling in Ontario in 2003.
- Top activities for U.S. visitors were shopping and sightseeing.
- One third (33%) of Ontario's U.S. visitors travelled to Niagara Region in 2003.

Introduction

The information contained in this report was extracted from the micro data files of the International Travel Survey (ITS) by Research Resolutions & Consulting Ltd. on behalf of the Ontario Ministry of Tourism and Recreation.

The ITS is conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities which essentially conducts a census of border crossings and distributes the questionnaires to a sample of individual travellers. The questionnaires are self-completed by the travellers and are mailed back to Statistics Canada.

The provincial statistics presented in this report are based on the census of U.S. visitors as far as their numbers, their origin and their mode of transport used to enter Canada are concerned. Most of the remaining trip characteristics were obtained from 22,979 completed questionnaires by U.S. visitors (out of39,118 usable questionnaires of U.S. visitors to Canada).

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit used.

2. Ontario does a number of imputations for missing values.

3. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

The regional data contained in this report differ from the data contained in pre-1998 ministry-publications because same day excursions by overnight visitors to Ontario were not included in the database prior to 1998. The reader is referred to the 1999 report and tabulations for a comparison of Ontario level data with and without same-day excursions by overnight visitors.

For more details on how Ontario manages this database, please write to the address below to obtain the technical appendix.

To aid the reader, a glossary of terms used throughout this report is appended. For more information on this publication please contact:

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ONTARIO'S U.S. TRAVEL MARKETS, 2003

How many U.S. travellers visited Ontario and where did they come from?

Of Ontario's 22.0 million U.S. visitors in 2003, the majority came from Michigan and New York State (37% and 31%, respectively).

- Ontario welcomed 22.0 million U.S. visitors in 2003. Of these visitors, 30% or 6.7 million stayed for one or more nights in the province.
- Visitors from Ontario's border states (see Table 1) made up 85% of the total U.S. person visits and 69% of overnight visits.
- Americans from Michigan (37%) and New York State (31%) made up the bulk of U.S. visitors in 2003, followed by Ohio (5%) and Minnesota (4%).

Table 1: Total U.S. Person Visits and Total U.S. Overnight Person Visits in Ontario, 2003

Origin	Total Visitors (000s)	% Share	Overnight Visitors (000s)	% Share
USA	22,009	100%	6,709	100%
Border States	18,638	85%	4,608	69%
New York	6,867	31%	1,273	19%
Michigan	8,231	37%	1,488	22%
Pennsylvania	699	3%	390	6%
Ohio	1,116	5%	593	9%
Illinois	480	2%	356	5%
Wisconsin	307	1%	206	3%
Minnesota	937	4%	302	5%
Other USA	3,371	15%	2,101	31%

Why did they travel in Ontario?

Ontario was a pleasure destination for the majority (51%) of total U.S. visitors in 2003.

- 11.3 million Americans travelled to Ontario for the main purpose of a pleasure trip in 2003. This was followed by visiting friends and relatives (VFR) as the second most popular reason for travelling to Ontario.
- The top reason for a trip to the province for residents of all states was for pleasure, followed by VFR, with the exception of residents from Illinois and Wisconsin where the second most popular reason for travelling to Ontario was for business.

Table 2: Total U.S. Person Visits by Origin and Main Purpose of Trip, 2003								
Origin	Pleasure	% of origin total	VFR	% of origin total	Business	% of origin total	Personal	% of origin total
USA	11,329	51%	3,289	15%	1,445	7%	175	1%
Border States	9,565	51%	2,617	14%	966	5%	103	1%
New York	3,531	51%	952	14%	195	3%	29	0%
Michigan	3,830	47%	1,281	16%	467	6%	27	0%
Pennsylvania	497	71%	65	9%	60	9%	12	2%
Ohio	763	68%	92	8%	93	8%	11	1%
Illinois	288	60%	64	13%	74	15%	14	3%
Wisconsin	174	57%	31	10%	39	13%	1	0%
Minnesota	481	51%	131	14%	39	4%	9	1%
Other USA	1,764	52%	672	20%	479	14%	72	2%

Table 3: Total U.S. Overnight Person Visits by Origin and Main Purpose of Trip, 2003								
Origin	Pleasure	% of origin total	VFR	% of origin total	Business	% of origin total	Personal	% of origin total
USA	3,950	59%	1,316	20%	796	12%	163	2%
Border States	2,956	64%	783	17%	384	8%	95	2%
New York	769	60%	275	22%	72	6%	26	2%
Michigan	957	64%	281	19%	92	6%	25	2%
Pennsylvania	268	69%	47	12%	45	12%	12	3%
Ohio	423	71%	78	13%	62	10%	10	2%
Illinois	208	58%	49	14%	63	18%	14	4%
Wisconsin	121	59%	21	10%	29	14%	1	0%
Minnesota	210	70%	32	11%	21	7%	7	2%
Other USA	994	47%	533	25%	411	20%	68	3%

How long did they stay in Ontario?

On average, U.S. visitors stayed in the province for 1.1 nights.

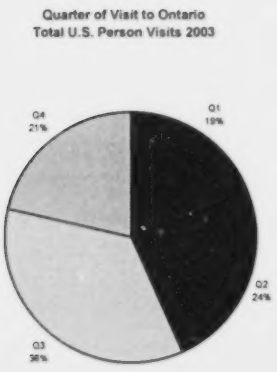
- On average, U.S. visitors stayed in the province for 1.1 nights. Overnight U.S. visitors stayed for an average of 3.5 nights.
- Residents of Michigan and New York State had the shortest visits (0.5 nights), while visitors from Illinois had the longest visits (3.4 nights).

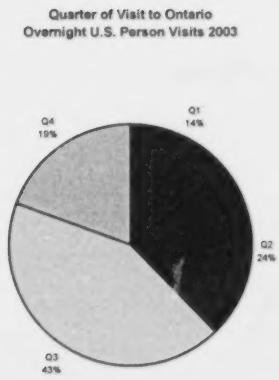
Table 4: Total U.S. Person Nights in Ontario and Average Length of Stay by Origin, 2003

Origin	Person Nights (000s)	% of total nights	Average Length of Stay (nights) - Total Visitors	Average Length of Stay (nights) - Overnight Visitors
USA	23,518	100%	1.1	3.5
Border States	14,376	61%	0.8	3.1
New York	3,651	16%	0.5	2.9
Michigan	3,812	16%	0.5	2.6
Pennsylvania	1,480	6%	2.1	3.8
Ohio	1,818	8%	1.6	3.1
Illinois	1,641	7%	3.4	4.6
Wisconsin	794	3%	2.6	3.9
Minnesota	1,180	5%	1.3	3.9
Other USA	9,142	39%	2.7	4.4

When did they visit Ontario?

36% of total U.S. visitors in 2003 travelled to Ontario in the summer.





- Most (36%) U.S. visits occurred during the third quarter (July, August, September), followed by the second quarter (24%) (April, May, June).
- Overnight U.S. visits were more concentrated in the third quarter with 43% of visitors, while 24% visited in the second quarter of 2003.
- As table 5 illustrates, residents of Michigan and New York State travelling to the province made up the majority of visitors in any calendar quarter.

Table 5: Total U.S. Person Visits by Calendar Quarter and Origin, 2003

	Q1	Q2	Q3	Q4
Total	4,238	5,280	7,787	4,708
Border States	3,934	4,452	6,207	4,045
Share	*93%*	*84%*	*80%*	*86%*
New York	1,313	1,700	2,401	1,453
Share	*31%*	*32%*	*31%*	*31%*
Michigan	2,034	1,922	2,374	1,901
Share	*48%*	*36%*	*30%*	*40%*
Pennsylvania	72	197	315	115
Share	*2%*	*4%*	*4%*	*2%*
Ohio	144	224	446	302
Share	*3%*	*4%*	*6%*	*6%*
Illinois	64	94	244	79
Share	*2%*	*2%*	*3%*	*2%*
Wisconsin	39	67	163	39
Share	*1%*	*1%*	*2%*	*1%*
Minnesota	267	249	265	155
Share	*6%*	*5%*	*3%*	*3%*
Other USA	304	829	1580	658
Share	*7%*	*16%*	*20%*	*14%*

How big were their travel parties?
Who were in their travel parties?

Most U.S. visitors (89%) travelled in parties of adults only. Average party sizes ranged from 2.0 to 2.4 depending on the origin of the visitor.

- Visitors from Michigan had the smallest average party size (2.0), while visitors from Wisconsin and Pennsylvania had the largest (2.4).
- Visitors from Ohio had the lowest occurrence of traveling in groups of adults only (83%), while visitors from Wisconsin had the highest (92%).
- Adult visitors from U.S. States other than the border states had the highest incidence (53%) of travelling alone in Ontario, followed by visitors from Illinois (43%).

Table 6: Total U.S. Party Visits Average Size and Composition, 2003

Origin	Average Party Size	Party Composition	
		Adults Only	Adults w/ Kids
USA	2.1	89%	11%
Border States	2.1	88%	12%
New York	2.1	89%	11%
Michigan	2.0	88%	12%
Pennsylvania	2.4	88%	12%
Ohio	2.3	83%	17%
Illinois	2.2	91%	9%
Wisconsin	2.4	92%	8%
Minnesota	2.3	90%	10%
Other USA	2.1	90%	10%

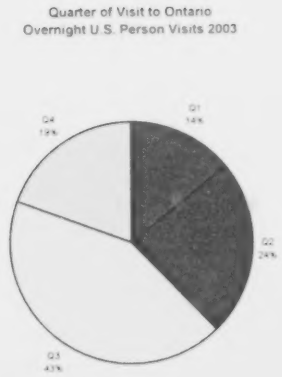
Table 7: Total U.S. Visitors Percent Party Size (Adults Only), 2003

Origin	1 adult	2 adults	3 or more adults
USA	39%	47%	14%
Border States	32%	52%	16%
New York	35%	53%	13%
Michigan	28%	55%	17%
Pennsylvania	34%	49%	17%
Ohio	28%	56%	16%
Illinois	43%	45%	12%
Wisconsin	16%	39%	45%
Minnesota	26%	50%	23%
Other USA	53%	37%	10%

- Adult visitors from Ohio had the highest frequency of travelling in groups of two in 2003 (56%).
- Adult visitors from Wisconsin had the highest frequency of travelling in groups of three or more in 2003 (45%).

When did they visit Ontario?

36% of total U.S. visitors in 2003 travelled to Ontario in the summer.



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- Adult visitors from Ohio had the highest frequency of travelling in groups of two in 2003 (56%).
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Where did they stay in Ontario?

Half (50%) of U.S. visitors spent nights in roofed commercial accommodation while travelling in Ontario in 2003.

- Staying in hotels, motels or other roofed commercial accommodation was the lodging choice for most Americans travelling in Ontario. Visitors from Ohio had the highest incidence of staying in hotels in Ontario.
- 22% of nights spent in Ontario by Americans were spent at the homes of friends or relatives. Visitors from New York State had the highest incidence of staying at the homes of friends and relatives in Ontario (23%).
- Visitors from Wisconsin had the highest incidence of spending nights in camping/trailer parks in Ontario (17%). Visitors from Wisconsin also had the highest incidence of spending nights in commercial cottages in Ontario (42%).
- Visitors from Minnesota had the highest incidence of spending nights at private cottages in Ontario in 2003 (16%).

Table 8: U.S. Visitors Accommodation Use by Person Nights and Origin, 2003

Type of Accommodation	USA	Border States	New York	Michigan	Penn.	Ohio	Illinois	Wisc.	Minn.
Total Person Nights	**23,518**	**14,376**	**3,651**	**3,812**	**1,480**	**1,818**	**1,641**	**794**	**1,180**
Hotel	26%	25%	26%	27%	24%	34%	23%	13%	10%
Motel	9%	10%	9%	10%	12%	12%	10%	7%	5%
Commercial Cottage	16%	18%	9%	12%	19%	15%	25%	42%	40%
Roofed Commercial Accommodation	50%	53%	45%	49%	55%	63%	58%	62%	55%
Camping/Trailer Park	5%	6%	4%	8%	7%	2%	1%	17%	10%
Home of Friend/Relative	22%	16%	23%	18%	14%	12%	11%	7%	9%
Private Cottage	9%	10%	10%	9%	14%	9%	7%	4%	16%

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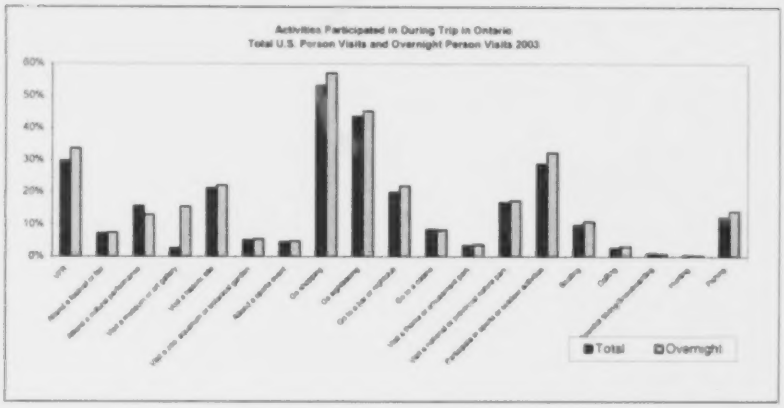
Commercial Cottage	16%	18%	9%	12%	19%	15%	25%	42%	40%
Roofed Commercial Accommodation	50%	53%	45%	49%	55%	63%	58%	62%	55%
Camping/Trailer Park	5%	6%	4%	8%	7%	2%	1%	17%	10%
Home of Friend/Relative	22%	16%	23%	18%	14%	12%	11%	7%	9%
Private Cottage	9%	10%	10%	9%	14%	9%	7%	4%	16%

What activities did they participate in?

Top activities for U.S. visitors were shopping and sightseeing.

- Top activities for total U.S. visitors were shopping (53%), sightseeing (44%) and visiting friends and relatives (VFR) (30%).
- Other popular activities included participating in sports/outdoor activities (29%), visiting historic sites (21%) and going to bars and nightclubs (20%).



- As the graph above illustrates, overnight U.S. visitors had higher participation rates in nearly all activity categories.
- Table 9 depicts Ontario's U.S. markets by origin and their participation in activities in the province.
- Shopping was the top activity for U.S. visitors from New York, Michigan, Pennsylvania, Illinois and Wisconsin. Sightseeing was the top activity for visitors from Ohio and participating in sports/outdoor activities was the top activity for visitors from Minnesota.
- U.S. visitors from Pennsylvania were the most active, participating in an average of 3.0 activities per person visit, followed by visitors from Ohio and Illinois (2.9 activities).

Table 9: Total U.S. Visitors in Ontario Activities Participated in During Trip by Origin, 2003									
Activity	Total	Border States	New York	Michigan	Penn.	Ohio	Ill.	Wisc.	Minn.
Total Person Visits (000s)	**22,009**	**18,638**	**6,867**	**8,231**	**699**	**1,116**	**480**	**307**	**937**
Average Number of Activities per Visit	**2.6**	**2.6**	**2.5**	**2.4**	**3.0**	**2.9**	**2.9**	**2.5**	**2.2**
VFR	30%	26%	29%	25%	27%	22%	28%	16%	24%
Attend a festival or fair	7%	7%	9%	7%	8%	5%	8%	5%	5%
Attend a cultural performance	16%	18%	19%	26%	9%	13%	9%	5%	4%
Visit a museum or art gallery	3%	12%	12%	10%	12%	19%	22%	9%	9%
Visit a historic site	21%	18%	15%	16%	26%	24%	26%	22%	14%
Visit a zoo, aquarium or botanical garden	5%	4%	4%	4%	4%	4%	6%	2%	4%
Attend a sports event	5%	4%	7%	3%	3%	2%	5%	3%	2%
Go shopping	53%	50%	52%	47%	62%	58%	50%	49%	36%
Go sightseeing	44%	40%	34%	36%	57%	59%	42%	41%	27%
Go to a bar or nightclub	20%	19%	18%	18%	23%	21%	24%	19%	13%
Go to a casino	8%	9%	8%	11%	10%	12%	3%	12%	3%
Visit a theme or amusement park	3%	3%	6%	3%	2%	3%	2%	*	1%
Visit a national or provincial nature park	17%	15%	9%	12%	23%	20%	25%	23%	17%
Participate in sports or outdoor activities	29%	30%	27%	23%	37%	28%	35%	43%	64%
Boating	10%	10%	9%	7%	17%	7%	10%	12%	25%
Golfing	3%	3%	2%	4%	4%	2%	2%	1%	2%
Downhill skiing/snowboarding	1%	1%	1%	1%	1%	*	2%	*	*
Hunting	*	*	*	*	*	*	*	1%	1%
Fishing	12%	13%	7%	7%	21%	8%	22%	35%	55%

* less than 1%

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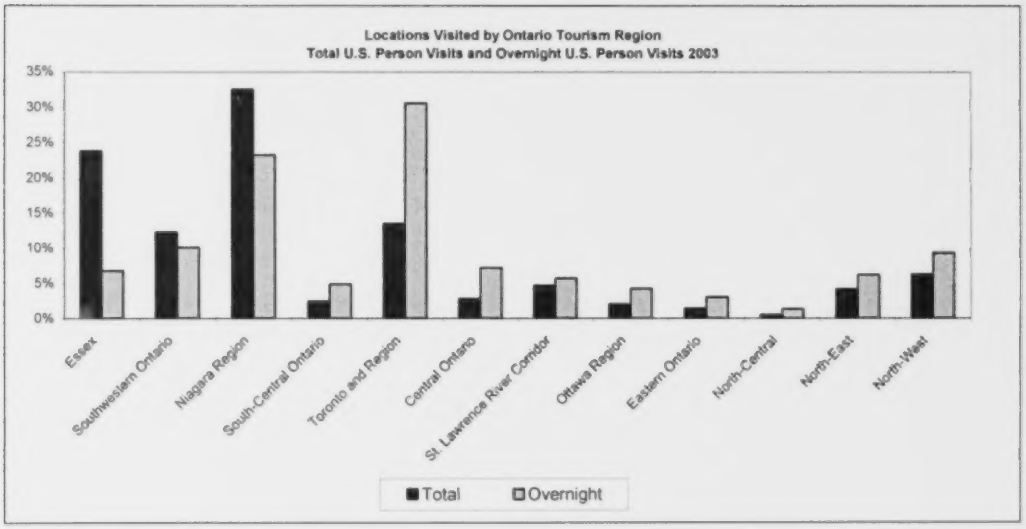
Average Number of Activities per Visit	2.6	2.6	2.5	2.4	3.0	2.9	2.9	2.5	2.2
VFR	30%	26%	29%	25%	27%	22%	28%	16%	24%
Attend a festival or fair	7%	7%	9%	7%	8%	5%	8%	5%	5%
Attend a cultural performance	16%	18%	19%	26%	9%	13%	9%	5%	4%
Visit a museum or art gallery	3%	12%	12%	10%	12%	19%	22%	9%	9%
Visit a historic site	21%	18%	15%	16%	26%	24%	26%	22%	14%
Visit a zoo, aquarium or botanical garden	5%	4%	4%	4%	4%	4%	6%	2%	4%
Attend a sports event	5%	4%	7%	3%	3%	2%	5%	3%	2%
Go shopping	53%	50%	52%	47%	62%	58%	50%	49%	36%
Go sightseeing	44%	40%	34%	36%	57%	59%	42%	41%	27%
Go to a bar or nightclub	20%	19%	18%	18%	23%	21%	24%	19%	13%
Go to a casino	8%	9%	8%	11%	10%	12%	3%	12%	3%
Visit a theme or amusement park	3%	3%	6%	3%	2%	3%	2%	*	1%
Visit a national or provincial nature park	17%	15%	9%	12%	23%	20%	25%	23%	17%
Participate in sports or outdoor activities	29%	30%	27%	23%	37%	28%	35%	43%	64%
Boating	10%	10%	9%	7%	17%	7%	10%	12%	25%
Golfing	3%	3%	2%	4%	4%	2%	2%	1%	2%
Downhill skiing/snowboarding	1%	1%	1%	1%	1%	*	2%	*	*
Hunting	*	*	*	*	*	*	*	1%	1%
Fishing	12%	13%	7%	7%	21%	8%	22%	35%	55%

* less than 1%

Which Ontario regions* did they visit?

One third (33%) of Ontario's U.S. visitors travelled to Niagara Region in 2003.



- Niagara Region and Essex were the top destinations for total U.S. visitors.
- Toronto and Region and Niagara Region were the top destinations for overnight U.S. visitors in 2003.
- Top Ontario destinations for visitors from New York State were Niagara Region (68%) and Toronto and Region (12%).
- Top destinations for residents of Michigan travelling in Ontario were Essex (54%) and Southwestern Ontario (26%).
- Top destinations for Pennsylvania residents travelling in Ontario were Niagara Region (50%) and Toronto and Region (21%).
- Top destinations for residents of Ohio travelling in Ontario were Niagara Region (37%) and Essex (33%).
- Top destinations for Illinois residents travelling in Ontario were Toronto and Region (31%), and Niagara Region (21%).
- Top destinations for Wisconsin residents travelling in Ontario were North-West (33%) and North-East (23%).
- The top destination for Minnesota residents travelling in Ontario was North-West (88%).

* Please see page 20 for a map of Ontario's Travel Regions.

Table 10: Total U.S. Visitors in Ontario
Locations Visited in Ontario by Tourism Region* and Origin, 2003

Tourism Region	Total	Border States	New York	Michigan	Penn.	Ohio	Ill.	Wisc.	Minn.
Total Person Visits (000s)	**22,009**	**18,638**	**6,867**	**8,231**	**699**	**1,116**	**480**	**307**	**937**
Essex	24%	27%	1%	54%	3%	33%	12%	6%	1%
Southwestern Ontario	12%	13%	2%	26%	3%	5%	11%	4%	1%
Niagara Region	33%	33%	68%	6%	50%	37%	21%	16%	3%
South-Central Ontario	2%	2%	2%	1%	5%	2%	3%	6%	1%
Toronto and Region	13%	10%	12%	5%	21%	16%	31%	20%	4%
Central Ontario	3%	2%	2%	2%	3%	3%	8%	3%	1%
St. Lawrence River Corridor	5%	4%	9%	**	14%	2%	3%	1%	**
Ottawa Region	2%	1%	2%	**	2%	1%	6%	3%	1%
Eastern Ontario	1%	1%	2%	**	10%	1%	2%	1%	1%
North-Central	1%	**	**	**	1%	1%	1%	3%	2%
North-East	4%	4%	**	6%	2%	5%	5%	23%	2%
North-West	6%	6%	1%	1%	**	1%	16%	33%	88%

**The percentages are based on the total number of visitors with a known regional destination in Ontario.*
Note: The sum of each column is greater than 100% because multiple locations may be visited in a given trip.
**less than 1%

Table 10: Total U.S. Visitors in Ontario
Locations Visited in Ontario by Tourism Region* and Origin, 2003

Tourism Region	Total	Border States	New York	Michigan	Penn.	Ohio	Ill.	Wisc.	Minn.
Total Person Visits (000s)	22,009	18,638	6,867	8,231	699	1,116	480	307	937
Essex	24%	27%	1%	54%	3%	33%	12%	6%	1%
Southwestern Ontario	12%	13%	2%	26%	3%	5%	11%	4%	1%
Niagara Region	33%	33%	68%	6%	50%	37%	21%	16%	3%
South-Central Ontario	2%	2%	2%	1%	5%	2%	3%	6%	1%
Toronto and Region	13%	10%	12%	5%	21%	16%	31%	20%	4%
Central Ontario	3%	2%	2%	2%	3%	3%	8%	3%	1%
St. Lawrence River Corridor	5%	4%	9%	**	14%	2%	3%	1%	**
Ottawa Region	2%	1%	2%	**	2%	1%	6%	3%	1%
Eastern Ontario	1%	1%	2%	**	10%	1%	2%	1%	1%
North-Central	1%	**	**	**	1%	1%	1%	3%	2%
North-East	4%	4%	**	6%	2%	5%	5%	23%	2%
North-West	6%	6%	1%	1%	**	1%	16%	33%	88%

**The percentages are based on the total number of visitors with a known regional destination in Ontario.*
Note: The sum of each column is greater than 100% because multiple locations may be visited in a given trip.
***less than 1%*

How much money did they spend in Ontario?

Visitor spending by U.S. visitors in Ontario reached $4.0 billion in 2003.

- U.S. visitors spent $3.6 billion in the province and an additional $347 million on Canadian carrier fares in order to get here, for a total of $4.0 billion in 2003. Ontario received 43% of all spending by U.S. visitors in Canada in 2003 ($4.0 billion out of $9.2 billion).
- Overnight visitors from the U.S. accounted for 71% of (U.S.) spending, but only 30% of total U.S. visits.
- Total average spending per person visit was $180, per same day visit was $74 and per overnight visit was $420.
- Of the border states, visitors from New York State had the lowest average spending per person visit ($107) and visitors from Illinois had the highest ($495).

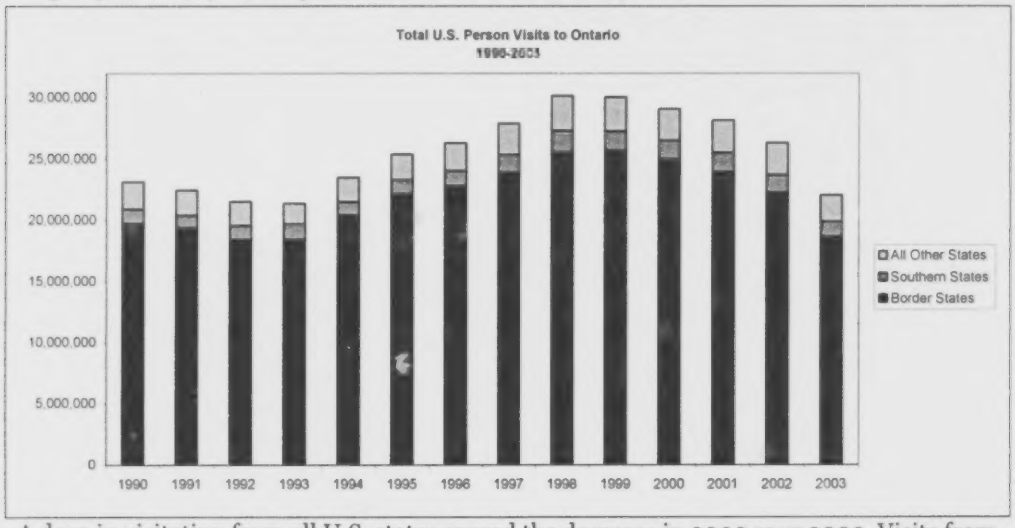
Table 11: U.S. Visitors Spending in Ontario by Origin 2003

	Total Visitor Spending	%	Avg $ per visit	Overnight Visitor Spending	%	Avg $ per visit
USA	$3,957,242	100%	$180	$2,815,722	100%	$420
Border States	$2,605,438	66%	$140	$1,608,828	57%	$349
New York	$732,853	19%	$107	$368,686	13%	$290
Michigan	$922,078	23%	$112	$423,570	15%	$285
Pennsylvania	$188,206	5%	$269	$154,466	5%	$396
Ohio	$270,885	7%	$243	$218,924	8%	$369
Illinois	$237,661	6%	$495	$225,304	8%	$633
Wisconsin	$103,348	3%	$337	$93,833	3%	$456
Minnesota	$150,407	4%	$161	$124,045	4%	$411
Other USA	$1,351,804	34%	$401	$1,206,894	43%	$574

- U.S. visitors travelling primarily for pleasure spent more money in Ontario than did those travelling for any other purpose ($2.1 billion or 52% of total U.S. spending). U.S. visitors travelling primarily for business spent $765 million or 19% of total U.S. spending. U.S. visitors travelling primarily to visit friends and/or relatives spent $439 million or 11% of total U.S. spending.

How did tourism in 2003 compare to previous years?

- In 2003, visitation from the U.S. to Ontario decreased by 16% over 2002. This was by far the largest year-over-year drop in visitation over the last 14 years.



- A drop in visitation from all U.S. states caused the decrease in 2003 over 2002. Visits from the border states decreased by 16%, the Southern states decreased by 15% and from all other states decreased by 20%.

- As the graph above illustrates, U.S. visitation to Ontario had been decreasing since 1999; the decrease was further exacerbated when the World Health Organization imposed a travel advisory on Toronto due to SARS on April 23, 2003 causing international and domestic visitors alike to travel elsewhere.

Table 12: Total U.S. Person Visits to Ontario (000s) by Origin
Percentage Change Year-Over-Year
1998 to 2003

	1998	1999	2000	2001	2002	2003
USA	30,168	30,031	29,076	28,134	26,318	22,009
% ch*		0%	-3%	-3%	-6%	-16%
Border States	25,515	25,676	24,974	23,941	22,195	18,638
% ch*		1%	-3%	-4%	-7%	-16%
New York	8,566	8,683	8,690	8,978	8,533	6,867
% ch*		1%	0%	3%	-5%	-20%
Michigan	12,388	12,514	12,113	11,010	9,669	8,231
% ch*		1%	-3%	-9%	-12%	-15%
Pennsylvania	874	938	884	933	915	699
% ch*		7%	-6%	6%	-2%	-24%
Ohio	1,669	1,632	1,496	1,415	1,379	1,116
% ch*		-2%	-8%	-5%	-3%	-19%
Illinois	624	640	532	513	536	480
% ch*		3%	-17%	-4%	4%	-10%
Wisconsin	421	407	324	370	339	307
% ch*		-3%	-20%	14%	-8%	-9%
Minnesota	973	862	934	722	825	937
% ch*		-11%	8%	-23%	14%	14%
Other USA	4,653	4,355	4,102	4,193	4,123	3,371
% ch*		-6%	-6%	2%	-2%	-18%

*percentage change over previous year

- In 2003, same day visits decreased by 16% and overnight visits decreased by 17% over 2002.

- Table 12 illustrates total person visits by origin dating back to 1998. Overall, person visits from the U.S. have been decreasing since 1998. All U.S. markets decreased in 2003 over 2002 with the exception of Minnesota.

- Meanwhile, travel for any reason to Ontario decreased in 2003 over 2002 (see Table 13). Travel to Ontario for a pleasure trip from border states decreased every year with the exception of 1999 over 1998.

Table 13: Percentage Change Year-Over-Year by Main Purpose of Trip and Origin 1998 to 2003

	Pleasure (% ch*)		Visiting Friends and Relatives (% ch*)		Business (% ch*)	
	USA	Border States	USA	Border States	USA	Border States
1999	0%	3%	3%	4%	6%	3%
2000	-4%	-4%	-4%	-6%	-12%	-9%
2001	0%	-2%	-3%	-4%	-12%	-11%
2002	-5%	-6%	-8%	-10%	-4%	-3%
2003	-18%	-18%	-11%	-11%	-22%	-20%

**percentage change over previous year*

- After showing increases in 1999 over 1998, VFR and business travel have both decreased every year since.

Table 14: Average Length of Stay in Nights Total U.S. Person Visits by Origin 1998 to 2003

	Total	Border States	New York	Michigan	Penn.	Ohio	Ill.	Wisc.	Minn.	Other USA
1998	0.8	0.6	0.5	0.3	1.9	1.2	2.1	2.3	1.1	2.0
1999	0.9	0.6	0.5	0.3	1.8	1.3	2.4	3.0	1.3	2.3
2000	0.9	0.6	0.5	0.3	1.9	1.3	2.5	3.0	1.2	2.3
2001	1.0	0.7	0.5	0.4	2.0	1.6	2.8	3.4	1.6	2.5
2002	1.0	0.8	0.5	0.5	2.0	1.6	3.3	3.1	1.3	2.6
2003	1.1	0.8	0.5	0.5	2.1	1.6	3.4	2.6	1.3	2.7

- Table 14 outlines the average length of stay in nights for total person visits in 1998 to 2003. As shown in the table, length of stay has increased in all markets in 2003 over 1998 with the exception of New York, which remained the same.

Table 15: Total U.S. Overnight Person Nights (000s) by Type of Accommodation Used Percentage Change over the Previous Year 1999 to 2003									
	1999	2000	% ch*	2001	% ch*	2002	% ch*	2003	% ch*
Hotel	7,486	7,019	-6%	7,625	9%	7,936	4%	6,054	-24%
Motel	2,659	2,437	-8%	2,550	5%	2,765	8%	2,014	-27%
Commercial Cottage/Cabin	3,932	3,782	-4%	4,201	11%	4,150	-1%	3,697	-11%
Camping/Trailer Park	1,558	1,371	-12%	1,447	6%	1,342	-7%	1,212	-10%
Home of Friend/Relative	5,364	5,250	-2%	5,756	10%	5,632	-2%	5,225	-7%
Private Cottage	1,678	1,747	4%	1,900	9%	2,115	11%	2,042	-3%
Total overnight visits	25,893	24,918	-4%	27,119	9%	27,578	2%	23,518	-15%
* Percentage change over the previous year									

- The use of all types of accommodation dropped in 2003 over 2002, with the largest decrease being realized by motels (27% decrease).
- Visitor spending decreased by 19% from $4.9 billion in 2002 to $4.0 billion in 2003.
- After removing inflationary impacts, U.S. visitor spending in Ontario in constant dollars (1992) decreased by 16% from $3.8 billion in 2002 to $3.1 billion in 2003.

Table 16: Total U.S. Visitor Spending in Ontario 1998 to 2003 1992=100						
	1998 ($000) *(% share)*	1999 ($000) *(% share)*	2000 ($000) *(% share)*	2001 ($000) *(% share)*	2002 ($000) *(% share)*	2003 ($000) *(% share)*
Accommodation	$887,856 *22%*	$832,064 *21%*	$756,070 *20%*	$808,244 *21%*	$916,524 *24%*	$822,201 *26%*
Food & Beverage	$949,023 *24%*	$951,495 *24%*	$886,234 *23%*	$924,700 *24%*	$897,631 *24%*	$733,543 *23%*
Canadian Carrier fares	$397,003 *10%*	$455,372 *11%*	$487,916 *13%*	$399,478 *10%*	$345,788 *9%*	$204,150 *6%*
Public/Local Transport	$73,729 *2%*	$81,579 *2%*	$80,020 *2%*	$83,659 *2%*	$81,193 *2%*	$71,535 *2%*
Private Transport	$352,421 *9%*	$371,596 *9%*	$277,319 *7%*	$284,287 *7%*	$257,412 *7%*	$213,034 *7%*
Recreation/ Entertainment	$644,229 *16%*	$593,764 *15%*	$586,749 *15%*	$602,266 *16%*	$544,157 *15%*	$451,858 *14%*
Retail/Other	$662,677 *17%*	$683,543 *17%*	$753,860 *20%*	$714,214 *19%*	$709,645 *19%*	$649,570 *21%*
Total	$3,966,938 *100%*	$3,969,414 *100%*	$3,828,169 *100%*	$3,816,848 *100%*	$3,752,350 *100%*	$3,145,892 *100%*

- Table 16 illustrates visitor spending by category for the years 1998 to 2003 with the inflationary impacts removed (all dollar figures are expressed in 1992 figures). The table also provides the percentage share of total visitor spending for each category.
- Spending on accommodation increased from 22% of U.S. visitor spending in 1998 to 26% in 2003. Spending on retail increased by 17% of U.S. visitor spending in 1998 to 21% in 2003. Meanwhile, U.S. visitor spending on food and beverage decreased from 24% of visitor spending in 1998 to 23% in 2002.

- Average visitor spending per person visit has remained relatively low over the 1998 to 2003 period, due to the high volume of same day visits from the U.S.. Average visitor spending (expressed in 1992 dollars) was $131 per person visit in 1998 and reached $143 in 2003.

Glossary

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

***Other* accommodation** is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to MTR rules.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention*

has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. A one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS, a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same day trips to region x.

Map of Ontario Travel Regions